EUROPEAN CLUSTER COLLABORATION PLATFORM
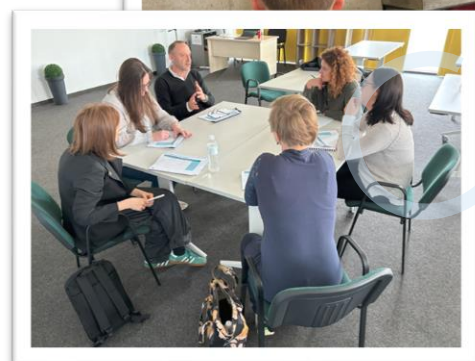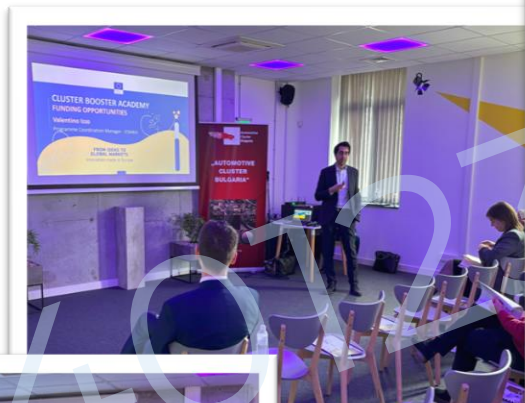
3rd Cluster Booster Academy

Training Days 4-5

March 11-12, 2024

Sofia, Bulgaria

An initiative of the European Union

3rd CBA in Sofia embarking on a journey of diverse learning experiences from insightful keynote speeches to vibrant interactive workshops and beyond...

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Agenda Cluster Booster Academy (Day 4)

10.00 – 10.15	**Welcome and introduction to the training**
10.15 – 10.30	**Keynote Speech:** EU Industrial Policy by Carolina Pedrosa Ferreira, European Commission
10.30 – 11.00	***Share & Learn:*** *Participant's experiences on challenges and learnings while setting up and implementing a business model improving action plan*
11.00 – 12.30	***Breakout session solutions to challenges:*** *Interactive problem-solving to collaboratively develop solutions to biggest challenges*
12.30 – 13.30	Lunch break
13.30 – 14.00	**Keynote Speech:** Funding opportunities by Valentino Izzo, European Commission
14.00 – 15.00	**Green Transition Support:** Introduction to the green transition methodology and tools, featuring best practices from various clusters along with participant discussions on regional or cluster-specific green transition efforts
15.00 – 15.15	Coffee Break
15.15 – 16.45	***Matchmaking event:*** *Interactive matchmaking event to share and learn about projects, initiatives, programs, etc. the participants are working on/plan to work on in the near future*
16.45 – 17.00	**Wrap-up, feedback and Q&A**

Beginning/ Ending

Break

Italics Interactive session

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Agenda Cluster Booster Academy (Day 5)

09.00 – 09.30	**Welcome day 5 and short recap**
9.30 – 10.00	**Keynote Speech:** Innovative projects of Automotive Cluster Bulgaria by Lyubomir Stanislavov, Automotive Cluster Bulgaria
10.00 – 12.00	***Self-reflection and breakout session on individual action plan:*** – *Advance your action plan by refining and developing it further* – *Pitch the action plan and receive feedback* – *Integrate feedback into action plan*
12.00 – 13.00	Lunch break
13.00 – 13.30	**Setting up a monitoring system:** – Overview of categories and indicators to monitor and evaluate cluster activities and business model improvements
13.30 – 14.00	**Final Q&A, feedback and closing of the training**

Beginning/ Ending

Break

Italics Interactive session

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4

The program advances from strategy evaluation and action plan adaption to reflective improvement via feedback integration

Overview key learnings

Day 1 (virtual): Cluster Strategy Evaluation
- Strengthen strategic thinking for effective leadership in cluster management
- Acquire deepened understanding of the existing obstacles confronting the cluster

Day 2 (virtual): Business Model Formulation
- Elevate comprehension of the business model canvas within the realm of cluster strategy
- Utilize exemplary model clusters and established best practices to refine one's own business framework

Day 3 (virtual): Action Plan Adaption
- Enhance capabilities in discerning emerging trends within industry landscapes
- Revise the action plan to fortify adaptability in the face of evolving circumstances

Day 4 (in-person): Collaborative Problem-Solving
- Expand collaboration opportunities by engaging in knowledge sharing and structured networking programs
- Innovate to tackle the unique challenges faced by the cluster and its sustainability journey

Day 5 (in-person): Reflective Improvement
- Refine individual action plan while integrating reflective learning for agility
- Develop robust monitoring systems strengthening the overall evaluation process

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Source: IMP³ROVE

5

Keynote:
EU Industrial Policy

Carolina Pedrosa Ferreira,
European Commission (DG GROW)

Share & Learn: Challenges setting up a business model improving action plan

Main challenges while setting up and implementing your action plan

Instructions

You are divided into 2 groups, each consisting of equal amount of people.

Please **present your main challenges** while setting up and implementing the business model improving action plan **and discuss it with your group**.

Main Challenges
— …
— …
— …

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Source: IMP³ROVE

Breakout session: Solutions to challenges

Breakout session: develop solutions to biggest challenges

Instructions

During the breakout sessions, we will adopt a 5-stage problem-solving approach and collaborate as a team to generate solutions:

1 Briefly define the challenges and **ensure a comprehensive understanding** of their underlying root causes. (~5 minutes)

2 Please **provide your solutions for the corresponding challenge** by writing them on post-it notes and placing them on the board. (~15 minutes)

3 Once all ideas are placed on the board, please **vote** for the **best** idea per challenge. (~3 minutes per challenge)

4 The **trainer will select the solution** with the greatest number of votes for each challenge.

5 Together, please **detail the best idea** for each challenge. (~5 minutes per challenge)

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Source: IMP³ROVE

Breakout session: develop solutions to biggest challenges

Group 1

1 Delivering innovative services for member and industry demands

2 Balancing industry members' interests with the broader cluster goals

3 Identifying potential new members aligned with the cluster's goals

4 Overcoming barriers to collaboration in a closed ecosystem

Group 2

5 Establishing efficient internal knowledge sharing and management processes

6 Evaluating potential new members' qualifications and contributions to the cluster

7 Navigating rapidly changing industry landscapes and technological advancements

8 Increasing member involvement and engagement

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Breakout session summary: solutions to biggest challenges

Challenge 1 — **Delivering innovative services for member and industry demands**

Solutions
- Increase member engagement in clusters' services
- Implement different membership tiers to address limited human and financial resources for services and idea implementation
- Enhance understanding of the particular challenges faced by members through one-on-one discussions over coffee
- Boost engagement in existing opportunities, such as grants, by illustrating and promoting successful use cases

Challenge 2 — **Balancing industry members' interests with the broader cluster goals**

Solutions
- Discover the interest of the members through 1:1 individual sessions

Challenge 3 — **Identifying potential new members aligned with the cluster's goals**

Solutions
- Address the lack of familiarity with the operating models and services of clusters by showcasing the collaboration with large companies
- Increase awareness of the sector and ecosystem
- Foster start-up collaboration
- Launch a promotional campaign
- Offer discounts for member engagement

Challenge 4 — **Overcoming barriers to collaboration in a closed ecosystem**

Solutions
- Facilitate the matching of interests among members of different sizes (small versus large) to promote central knowledge accumulation within the cluster.
- Address the lack of time for members with speed matchmaking

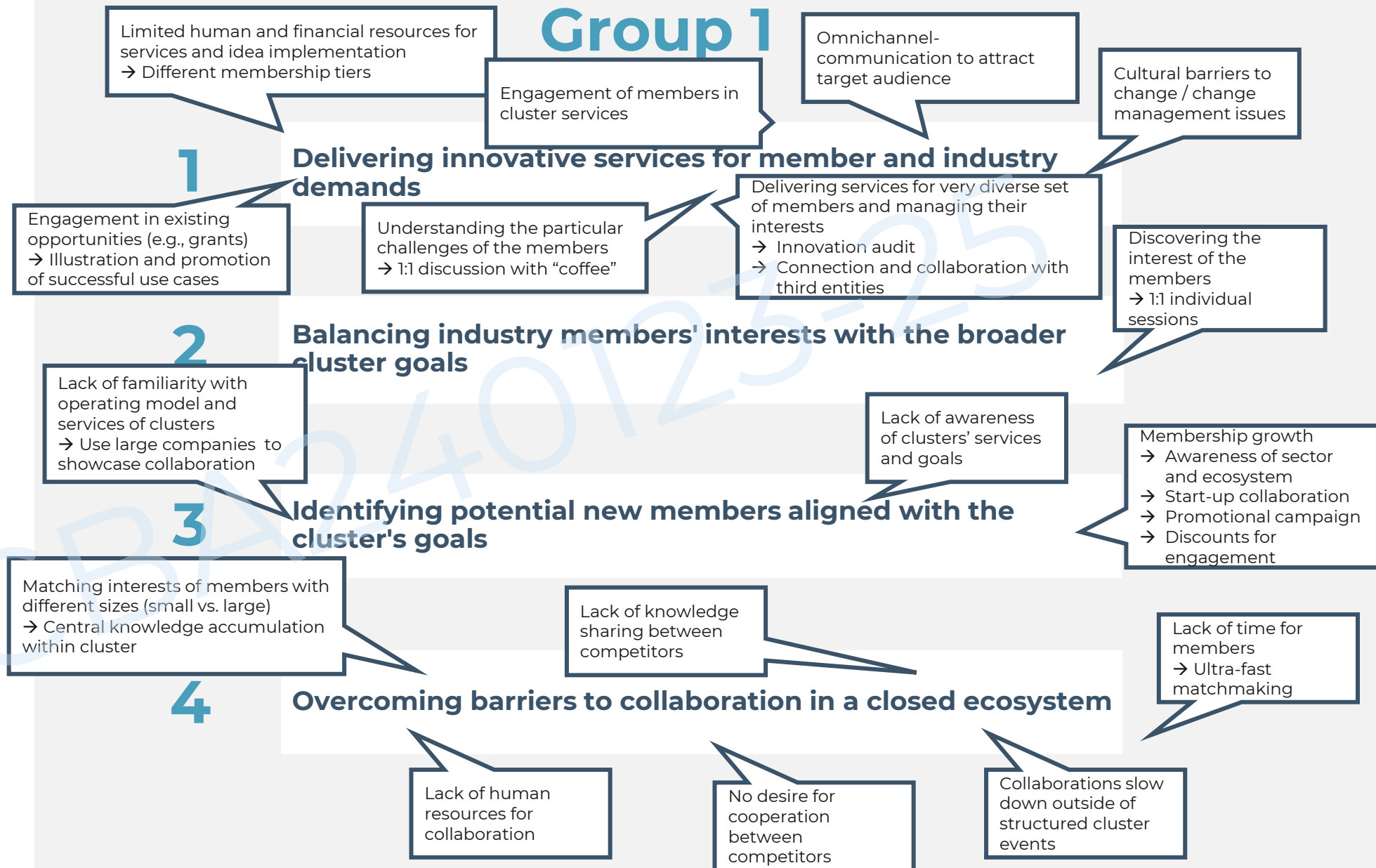**Challenge 8** — **Increasing member involvement and engagement**

Solutions
- Host matchmaking and networking events
- Maintain regular contacts to members
- Conduct surveys among members
- Showcase a favorable event
- Facilitate co-muturation between members and offer financing
- Initiate inter-cluster activities

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Breakout session summary: solutions to biggest challenges

Deep-dive into challenges 1-4

Group 1

Limited human and financial resources for services and idea implementation
→ Different membership tiers

Engagement of members in cluster services

Omnichannel-communication to attract target audience

Cultural barriers to change / change management issues

1 Delivering innovative services for member and industry demands

Engagement in existing opportunities (e.g., grants)
→ Illustration and promotion of successful use cases

Understanding the particular challenges of the members
→ 1:1 discussion with "coffee"

Delivering services for very diverse set of members and managing their interests
→ Innovation audit
→ Connection and collaboration with third entities

Discovering the interest of the members
→ 1:1 individual sessions

2 Balancing industry members' interests with the broader cluster goals

Lack of familiarity with operating model and services of clusters
→ Use large companies to showcase collaboration

Lack of awareness of clusters' services and goals

Membership growth
→ Awareness of sector and ecosystem
→ Start-up collaboration
→ Promotional campaign
→ Discounts for engagement

3 Identifying potential new members aligned with the cluster's goals

Matching interests of members with different sizes (small vs. large)
→ Central knowledge accumulation within cluster

Lack of knowledge sharing between competitors

Lack of time for members
→ Ultra-fast matchmaking

4 Overcoming barriers to collaboration in a closed ecosystem

Lack of human resources for collaboration

No desire for cooperation between competitors

Collaborations slow down outside of structured cluster events

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Lunch Break

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Source: IMP³ROVE

Keynote:
Funding Opportunities

Valentino Izzo,
European Commission (EISMEA)

Green Transition Support

Agenda

1. Introduction to Green Transition Support

2. What clusters can do
    1. Inspirational examples
    2. Overview of actions

3. Where to start – Group discussion
    1. Where do you stand in terms of green transition
    2. Next steps

4. Summary and conclusion
    1. Summary of group work
    2. How can ECCP help?

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1. Introduction to Green Transition Support

1. Green Transition Support: What is it and for whom?

Green Transition Support is
your knowledge hub to support

▷ energy efficiency

▷ resource efficiency

▷ and emission reduction

in European businesses.

Targeted users:

Clusters

Resource efficiency support providers

Multiplicators

https://clustercollaboration.eu/green
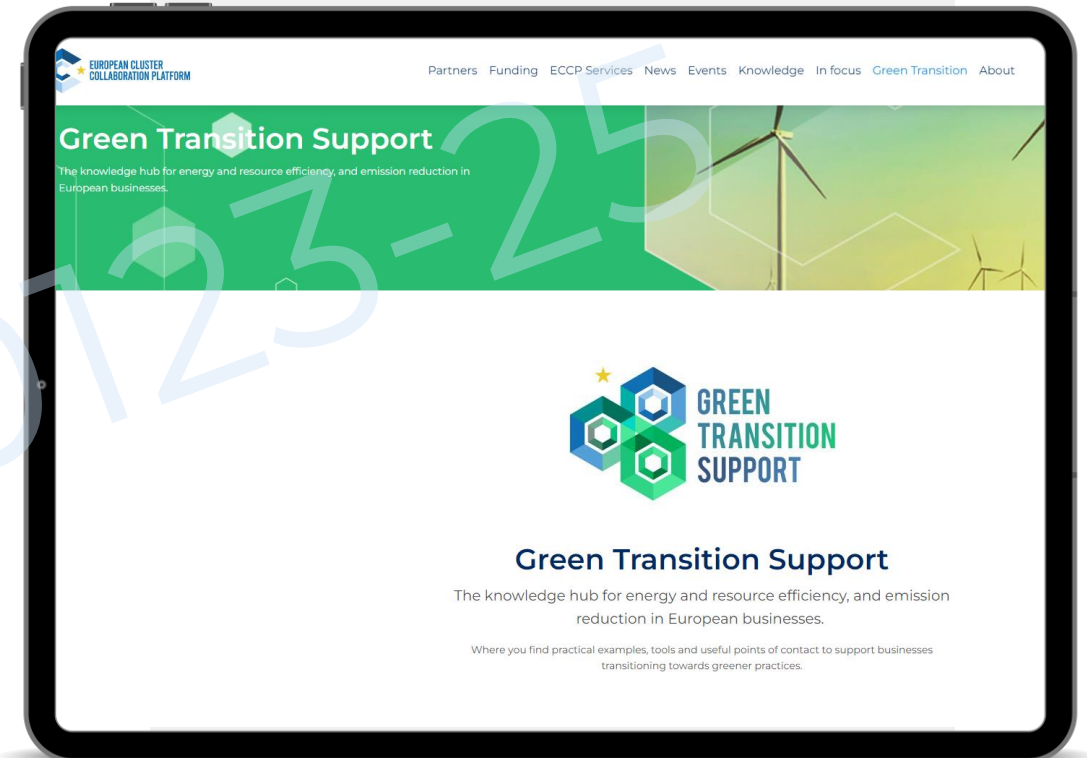
1. What does Green Transition Support offer?

Good Practice Database

Industrial Symbiosis Toolkit

Green News and Events

1. What does Green Transition Support offer?

Good practices database

More than 600 practical examples for green practices from businesses around Europe

- Search by keyword

- Filter by sector or type of environmental impact

- Get information on investment costs and payback time

- Find information on key areas of action

- Submit your examples to share knowledge and showcase your region

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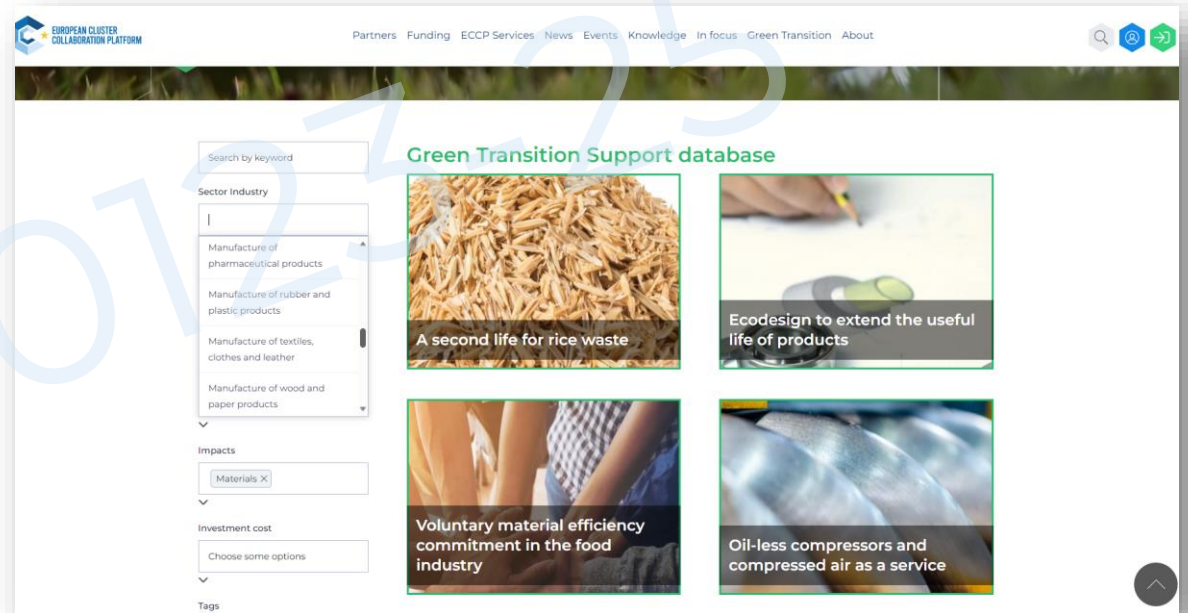
1. What does Green Transition Support offer?

Industrial symbiosis toolkit

Step-by-step approach on industrial symbiosis

- Find out how clusters and public authorities can promote the concept

- Learn about tools and methods

1. What does Green Transition Support offer?
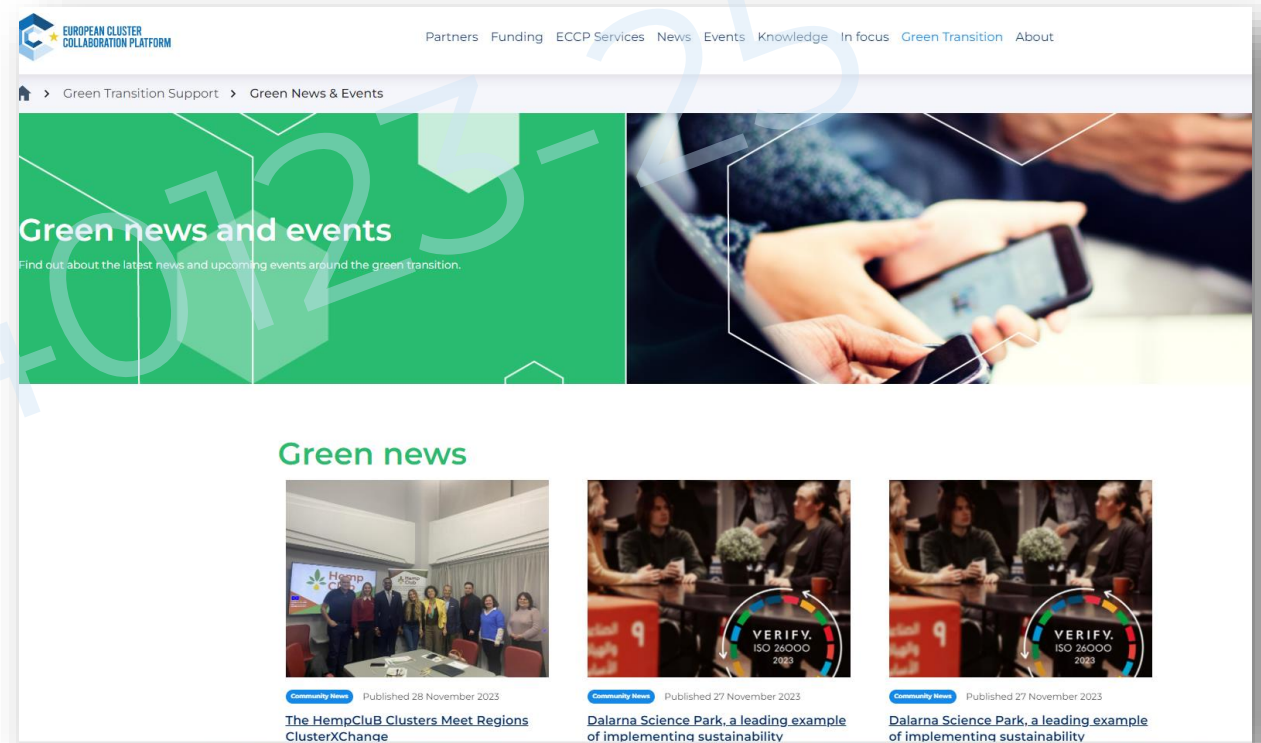
Green News, events & open calls

Get informed on relevant green news from the ECCP universe

- Green news

- Upcoming green events

- Open calls on green topics

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2. What clusters can do

2.1 Inspirational Examples: Capacity building

Cleantech Cluster Lithuania

CLEANTECH
CLUSTER
LITHUANIA

The cluster aimed to acquire knowledge and develope skills to help the cluster staff and members in their sustainability journey.

Activities undertaken:

- Identification of capacity-building needs of the cluster staff

- Selection of relevant topics

- Mapping of relevant good practice examples

- Design of capacity-building workshops for cluster staff

2.1 Inspirational Examples: Supporting sustainable business models

Lombardy green chemistry association

The cluster focused on promoting business models that are based on renewable raw materials and enhancing investments in green technologies, products and activities.

Activities undertaken:

- Webinars to share information on strategies to develop a business-plan for circular bio-based business

- One on one coaching with SMEs

- Organization of a „Bioeconomy Regional Investment Forum" where selected SMEs could pitch their new solutions to investors and the public

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2.2 Overview of Actions

Identify the sustainability needs in your cluster

Support capacity building for the cluster staff

Integrate sustainability as part of the cluster strategy

Play an active intermediary role

Participate in relevant green conferences and events

Provide relevant information and knowledge

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2.2 Overview of Actions

Identify the sustainability needs in your cluster

Contact your cluster members, particularly SMEs, to get to know their concerns and challenges regarding green transition.

Actions:

➤ Develope assessment surveys

➤ Conduct interviews with several cluster members to find out specific needs

Support capacity building for the cluster staff

Develope internal competences and expertise on relevant green topics to improve the support for cluster members

Actions:

➤ Identification of capacity-building needs of the cluster staff

➤ Selection of relevant topics

➤ Internal training programmes

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2.2 Overview of Actions

Play an active intermediary role

Connect members from your cluster to strengthen mutual learning and collaboration in green transition areas. Provide information on relevant projects, policies and funding opportunities.

Actions:

➢ Inform about policy/funding developments

➢ Initiate networking opportunities for cluster members

Integrate sustainability as part of the cluster strategy

Establish an open and continued dialogue with your cluster members about your green strategy. Engage them in the process and ensure that you are re-sponding to the changing needs of your companies.

Actions:

➢ Develop a green action plan or integrate sustainability principles as part of the overall objectives

➢ Communicate your cluster's strategic shift (via social media, website, events, publications)

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2.2 Overview of Actions

Provide relevant information and knowledge

Provide useful and practical knowledge on the website to support and inspire your cluster members.

Actions:

➤ Exhibit and showcase good practices

➤ Collect exisiting tools

➤ Develop new tools and guidelines specifically targeted to the needs of your cluster members

Participate in relevant green conferences and events

No one has all the answers regarding green transition. Use opportunities to share good practices and lessons learned with other clusters.

Actions:

➤ Participate in events and conferences

➤ Organize joint events with other cluster organizations

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3. Where to start

3. Where to Start: Group discussion

Instructions

Please break up into small groups (7-8 people).

You have **30 min** to discuss the provided questions, allowing all participants to share their thoughts and opinions.

Afterwards, we will reconvene in the plenary session where you can share the main outcomes of your discussions with the entire group.

Guiding Questions:

1. Where do you stand in terms of green transition?
   - What activities have already been undertaken in your cluster?
   - What worked well?
   - Where there any barriers/difficulties?

2. What do you think would be the ideal **next steps** for your cluster to go ahead in supporting green transition efforts?

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4. Summary and Conclusions

4. Summary and Conclusion

How can ECCP help your green transition?
- Which topics are relevant for you?
- Which formats would be helpful?

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Coffee Break

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Source: IMP³ROVE

Matchmaking Event

Matchmaking Event

Action

You've been paired with conversation partners based on the preferences you provided.

Please connect with your conversation partner as outlined in the plans.

Time

15 mins per conversation
90 mins in total

Summary
Q&A
Feedback

The program advances from strategy evaluation and action plan adaption to reflective improvement via feedback integration

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- Refine individual action plan while integrating reflective learning for agility
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Source: IMP³ROVE

Final Q&A

Social Dinner

19:45 p.m.

**Metropolitan Hotel Sofia,
1st floor Restaurant**

64 Tsarigradsko shoes boulevard, 1784 Sofia

3rd Cluster Booster Academy

Training Day 5

March 11-12, 2024

Sofia, Bulgaria

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Recap of yesterday's agenda (CBA Day 4)

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Beginning/ Ending

Break

Italics Interactive session

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12.00 – 13.00	Lunch break
13.00 – 13.30	**Setting up a monitoring system:** – Overview of categories and indicators to monitor and evaluate cluster activities and business model improvements
13.30 – 14.00	**Final Q&A, feedback and closing of the training**

Beginning/ Ending

Break

Italics Interactive session

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Keynote:
Innovative Projects of Automotive Cluster Bulgaria

Lyubomir Stanislavov,
Automotive Cluster Bulgaria

Self-reflection and breakout session: Individual action plan

Self-reflection and breakout session: Individual action plan

Instructions

Draw upon the insights gained from breakout sessions focused on solutions for the most significant challenges, keynote speeches, and ECCP Trend Universe to **refine and adjust one of your individual action plans**.

1 **Review the solutions** discussed during yesterday's breakout session and **advance your action** plan by refining and developing it further.
(~60 minutes)

Reflection

2 **Pitch your action plan** to the other participants and receive further **ad-hoc feedback** and inspirations.
(~45 minutes)

Feedback

3 **Integrate the feedback** and inspirations received **into your action plan.**
(~15 minutes)

Reflection

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Source: IMP³ROVE

Self-reflection: Template

The following structure can be used for your individual action plan

Objective *What is the goal?*	Action *What will be done?*	Responsible *Who will do it?*	Time Frame What are the start date and due date?	Peer Feedback What do your peers think?
	Step 1:			
	Step 2:			
	Step 3:			
	Step 4:			
	Step 5:			
	…			

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Source: IMP³ROVE

Lunch Break

Self-reflection: Group 1: delivering innovative services for member and industry demands

Action Plan for delivering innovative services for member and industry demands

Objective *What is the goal?*	Action *What will be done?*	Responsible *Who will do it?*	Time Frame *What are the start date and due date?*
Creating services that are relevant for my (potential) cluster members	**Step 1: Identify the needs within your cluster** – Needs analysis of the region concerned (themes, topics, trends) – Host trigger event (incl. survey) – Follow-up with 1:1 conversations	– Board of members – Project leads /network manager – Cluster manager	– 12 weeks – 52 weeks – 3 weeks
	Step 2: Analyze the results of the need identification – Segmentation of interest and needs within cluster – Draft of first implementation plan – Strategy Alignment – Stakeholder Alignment	– Project lead – Cluster manager – (Stakeholders)	– 2 weeks – 4 weeks
	Step 3: Implement the results form analysis		
	Step ... Creating a continuous process		

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Source: IMP³ROVE

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Self-reflection: Group 2: Engaging existing members

The following structure can be used for your individual action plan

Objective *What is the goal?*	Action *What will be done?*	Responsible *Who will do it?*	Time Frame *What are the start date and due date?*	Peer Feedback *What do your peers think?*
Form working groups based on members-needs	Gain survey-based understanding of needs and hot topics (research)			– Define personas to be invited – Select participants carefully
	Setup working group core structure based on needs			– Decide on aspects being either technologies, or managerial aspects, etc.
	Use cluster support to setup group-internal structure			– Define who will be the responsible decision maker
	Monitor and evaluate the progress, based on KPI			– Set the goals and communicate clearly
	Present working group results (success stories) to other members and stakeholders			– Decide on the representative/ group leader person/ personality

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Source: IMP³ROVE

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Self-reflection: Group 2: Imple-menting CRM

The following structure can be used for your individual action plan

Objective *What is the goal?*	Action *What will be done?*	Responsible *Who will do it?*	Time Frame *What are the start date and due date?*	Peer Feedback *What do your peers think?*
Establish a CRM to get a better overview of member engagement and to have an easier way to reach out	Perform team workshop to understand cluster needs			
	Research and screen existing CRM systems			
	Test 2-3 tools and decide on one as final solution			– AI potential to be elaborated further
	Clean existing data and create Manual			
	Implement solution and start team training	Potential Subcontractor to perform individualization		
	Use on daily basis and establish monthly meeting to discuss process review			– Furthermore include KPI reviews
	Establish regular data maintenance meetings			

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Source: IMP³ROVE

Self-reflection: Group 2: Finding funding

The following structure can be used for your individual action plan

Objective *What is the goal?*	Action *What will be done?*	Responsible *Who will do it?*	Time Frame *What are the start date and due date?*	Peer Feedback *What do your peers think?*
Financing the future of the cluster by funding access and stakeholder/ shareholder models	Decide on strategic objectives and role of cluster			
	Create storyline and prepare "internal pitch"			– Benefit-driven communication to invite stakeholders to "create the future"
	Develop ideas on potential financing and stakeholders and roles			
	Reach out to the board to discuss financing aspects of the cluster			– Rethink board based on strategically most important stakeholders in the region

Changing stakeholder structure from public-dominated to business and vice-versa;
deal with financing aspects;
drive board decisions with strategic direction.

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Setting up a monitoring system

How to set up performance indicators?

Performance indicators serve as crucial measures in tracking and analyzing the progress of an action plan's execution.

– **Quantitative** indicators reveal numeric changes, percentages, or averages related to plan execution.

– **Qualitative** indicators provide insights into alterations in stakeholder attitudes, motivations, and behaviors.

– Despite requiring more time for collection and analysis initially, **qualitative indicators offer invaluable feedback** for action plan enhancement.

– Indicators are used to track progress towards project targets, which should conform to the **SMART principles.**

Tips for the development of indicators

... should be **relevant to the needs** of the cluster actors and the purpose of monitoring

... a vaguely defined indicator will be open to several interpretations, **be specific**.

... avoid information overload and over-aggregation by **selecting only few** indicators.

... data collection costs and time should be in line with the **indicator's relevance**.

... indicators must also measure trends over time and thus **should be readily adaptable**.

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Source: ILO 2015, IMP³ROVE

Performance indicators form the bedrock of an effective monitoring & evaluation system

Exemplary

Exploring useful examples of performance indicators

Membership and growth	– Number of members – Member retention rate – New member acquisition rate – Percentage of members participating in cluster events – Average number of events attended per member – Participation in online platforms or forums
Financial performance	– Total revenue – Revenue per member – Revenue growth rate – Amount of external funding secured for cluster activities – Ration of external funding to operational budget – Number of successful grant applications for cluster projects
Networking and relationship building	– Number of B2B meeting facilitated – Participation in polity-related workshops or consultations – Frequency of dialogues or meetings with policy makers
Internationalization	– Number of international partnerships – Number of international trade missions organized – Percentage increase in international sales for member companies
Visibility and recognition	– Media coverage of cluster events and initiatives – Social media engagement and following – Member testimonials and satisfaction survey

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Source: IMP³ROVE

Monitoring tracks, evaluation assesses – both inform smarter actions

Monitoring and Evaluation (M&E)

Monitoring: Continuously analyzes real-time and ex-post outcomes compared to plans, serving as an objective early warning system for ongoing progress.

Evaluation: Involves reviewing the action plan to inform enhancements, considering subjective factors and potential future scenarios for a comprehensive understanding of program effectiveness and improvement possibilities.

	Monitoring	Evaluation
Character	Analytical, objective, and continuous tracking.	Evaluative, includes subjective aspects.
Timing	Throughout the action plan cycle (ex-post or real-time).	After or at specific points during the action plan implementation.
Purpose	Alerts and offers solutions for corrective action.	Performance assessment, improvement suggestions, and impact analysis.
Judgement	Avoids performance judgment, focuses on progress.	Involves assessment and comparison, fosters refinement and accountability.

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Source: UNEP 2020, IMP³ROVE

Monitoring and evaluation work in tandem during the Action Plan implementation

Relationship between Monitoring and Evaluation

Both monitoring and evaluation run alongside the Action Plan implementation and create a dynamic cycle of constant adaptation.

– previous training elements –

Cluster Strategy Review

Business Model

Action Plan Development

Cluster Strategy & Business Model

Action Plan

Action Steps

Requirements

Expected Outcome

Indicators

1

Continuous monitoring **tracks indicators against requirements**, offering real-time insights into action progress and alignment with outcomes.

Monitoring

2

Evaluation

Evaluation subjectively synthesizes monitoring data to create a holistic overview, **guiding comprehensive improvements in the action plan**.

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Extended Action Plan (incl. Monitoring & Evaluation)

Objective	Action	Responsible	Stakeholders	Requirements	Expected outcome	Time Frame	Indicators (KPIs)	Monitoring	Evaluation
What is the goal?	*What will be done?*	*Who will do it?*	*Who are the stakeholders to involve for success?*	*What is required (e.g., resources)?*	*What kind of outcome do you expect?*	*What are the start date and the due date?*	*How do I track action progress using clear metrics?*	*Are my actions aligning with indicators and staying on course?*	*What's the overall impact & effectiveness of my action?*

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Source: SPREP 2020, IMP³ROVE

Extended Action Plan - Example

Exemplary

Objective What is the goal?	Action What will be done?	Responsible Who will do it?	Stakeholders Who are the stakeholders to involve for success?	Requirements What is required (e.g., resources)?	Expected outcome What kind of outcome do you expect?	Time Frame What are the start date and the due date?	Indicators (KPIs) How do I track action progress using clear metrics?	Monitoring Are my actions aligning with indicators and staying on course?	Evaluation What's the overall impact & effectiveness of my action?
Secure essential fundings in alignment with the future development requirements of the cluster	Step 1: Conduct an assessment of cluster needs and development goals	Cluster manager	Cluster members and key stakeholders	Cluster development expertise	A clear understanding of cluster needs and development objectives	1st Mar 2024 – 31st Mar 2024	Needs assessment report: - number of identified cluster needs and development goals - stakeholder satisfaction with the needs assessment process (measured through surveys or feedback)	Regular meetings with stakeholders to provide updates on the assessment process	Evaluate how well the identified needs align with potential funding opportunities
	Step 2: Research and identify potential funding sources and opportunities	Inno-vation manager	Government agencies and potential partners	Research tools and networking capabilities	A list of potential funding sources and identified opportunities.	1st Apr 2024 – 15th Apr 2024	List of potential funding sources - number of potential funding sources identified - relevance score for each funding source and opportunity (e.g., on a scale of 1 to 5)	Regular progress updates on the research efforts	Assess the relevance and feasibility of each funding source and opportunity
	Step 3: Develop project proposal based on the identified needs and opportunities	Cluster and inno-vation manager	Cluster stakeholders and project team members	Expertise in proposal development and assembling a project team	A comprehensive project proposal ready for submission	15th April 2024 – proposal due date / 15th May 2024	Completed project proposal - Completeness and quality of the project proposal (e.g., percentage completion) - Reviewer feedback on the proposal's alignment with cluster needs and funding opportunities.	Regularly track the progress of proposal development	Review the proposal to ensure alignment with cluster goals and identified funding opportunities

Summary

Q&A

Feedback

The program advances from strategy evaluation and action plan adaption to reflective improvement via feedback integration

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- Strengthen strategic thinking for effective leadership in cluster management
- Acquire deepened understanding of the existing obstacles confronting the cluster

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- Utilize exemplary model clusters and established best practices to refine one's own business framework

Day 3 (virtual): Action Plan Adaption
- Enhance capabilities in discerning emerging trends within industry landscapes
- Revise the action plan to fortify adaptability in the face of evolving circumstances

Day 4 (in-person): Collaborative Problem-Solving
- Expand collaboration opportunities by engaging in knowledge sharing and structured networking programs
- Innovate to tackle the unique challenges faced by the cluster and its sustainability journey

Day 5 (in-person): Reflective Improvement
- Refine individual action plan while integrating reflective learning for agility
- Develop robust monitoring systems strengthening the overall evaluation process

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Final Q&A

Feedback

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